

# How to Make your CACFP Review a Success

## Webpages

Guidance Memorandums (GM): <a href="https://dpi.wi.gov/community-nutrition/cacfp/guidance-memo">https://dpi.wi.gov/community-nutrition/cacfp/guidance-memo</a>
CACFP Home : <a href="https://dpi.wi.gov/community-nutrition/cacfp">https://dpi.wi.gov/community-nutrition/cacfp</a>
New Meal Pattern: <a href="https://dpi.wi.gov/community-nutrition/cacfp/new-cacfp-meal-pattern">https://dpi.wi.gov/community-nutrition/cacfp/new-cacfp-meal-pattern</a>
Training Webcasts <ul style="list-style-type: none"> <li>• CC, OSHC, AR, ES: <a href="https://dpi.wi.gov/community-nutrition/cacfp/training/webcasts-cacfp">https://dpi.wi.gov/community-nutrition/cacfp/training/webcasts-cacfp</a></li> <li>• ADC: <a href="https://dpi.wi.gov/community-nutrition/cacfp/training/webcasts-adc">https://dpi.wi.gov/community-nutrition/cacfp/training/webcasts-adc</a></li> </ul>
Consultant Directory: <a href="https://dpi.wi.gov/community-nutrition/cacfp/map">https://dpi.wi.gov/community-nutrition/cacfp/map</a>

### Abbreviation Key

GM = Guidance Memorandum  
 CC = Child Care  
 OSHC = Outside of School Hours Care  
 AR = At Risk  
 ES = Emergency Shelter  
 ADC = Adult Day Care

## Other Items for the Review

- A work space for the consultant who will conduct the review
- A list of questions/concerns you may have about the CACFP
- Prior CACFP review report (if applicable)

## Administrative Records

Form	Requirements	Location/Info	Reminders, document who is in charge, where forms kept, etc.
<i>Guidance Memorandums (GM)</i>	Update binder <b>OR</b> GM webpage bookmarked	GM Webpage	
<i>Board Meeting Minutes</i>	Discuss CACFP annually  Document in meeting minutes	GM 9	

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## CACFP Enrollment Records

Form	Requirements	Location/Info	Reminders, document who is in charge, where forms kept, etc.
<b>Household Size Income Record (HSIR)</b> <ul style="list-style-type: none"> <li>• HSIR Excel (preferred) or Word</li> <li>• HSIR Reminders</li> </ul>	<p>List all enrolled children as N/R/F based off valid HSIS</p> <p>Complete monthly based on CACFP enrollment policy</p> <p><i>N/A for AR, ES</i></p>	<p>GM 1 HSIR Webcast</p>	
<b>Household Size Income Statement (HSIS)</b> <ul style="list-style-type: none"> <li>• Household Letter</li> <li>• HSIS</li> <li>• Instructions for Determining HSIS</li> </ul>	<p>Update annually (usually Sept or Oct)</p> <p>Valid for one year</p> <p><i>N/A for AR, ES</i></p>	<p>GM 1 HSIS Webcast</p>	
<b>Documentation of Head Start Children</b>	<p>Applicable if your agency has Head Start Children</p> <p><i>N/A for AR, ES, ADC</i></p>	<p>GM 1</p>	
<b>CACFP Enrollment Forms</b>	<p>Update annually</p> <p><i>N/A for AR, ES</i></p>	<p>GM 6</p>	
<b>Attendance Records</b>	<p>Maintain daily records of attendance</p>	<p>GM 9</p>	

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## Monthly Claim Records

Form	Requirements	Location/Info	Reminders, document who is in charge, where forms kept, etc.
<b>Menus</b> <ul style="list-style-type: none"> <li>• CACFP Meal Pattern</li> </ul>	Daily & dated with recorded substitutions for each approved meal service	GM 9, 12 Meal Pattern Webcast	
<b>Production Records</b> <ul style="list-style-type: none"> <li>• Meal Requirements Calculator</li> <li>• Food Buying Guide Calculator</li> </ul>	Documents quantity of food prepared for each approved meal service  <i>N/A for ES</i>	GM 9, 12 Production Record Webcast	
<b>Infant Meal Forms/Records</b> <ul style="list-style-type: none"> <li>• Infant Meal Pattern</li> </ul>	Record meal counts for infants at the time of service (After a reimbursable meal has been served)  Complete one form for each infant each month  <i>N/A for AR, ADC</i>	GM 9, 12 Webcasts: (1) Infant Meal Pattern (2) Creditable CACFP Infant Foods (3) Infant Recordkeeping Requirements	
<b>Time of Service Meal Count Records</b> <ul style="list-style-type: none"> <li>• Less than 3 Meal Services</li> <li>• Greater than 3 Meal Services</li> </ul>	Record meal counts for children (1-12 years) at the time of service (After a reimbursable meal has been served)	GM 9, 12 Webcasts: (1) Meal Counts for 3 or Less Meals (2) Meal Counts for Greater than 3 Meals	

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## CACFP Records

Form	Requirements	Location/Info	Reminders, document who is in charge, where forms kept, etc.
<b><i>Special Dietary Needs Tracking Form/Support Documents (NEW)</i></b>	<p>Medical Statement – meals not meeting CACFP requirements</p> <p>Parent/Guardian Request – Non-disability special dietary requests</p>	GM 12	
<b><i>Enrollment Packet</i></b>	<p>Include current CACFP forms (<i>Household Letter, HSIS, CACFP Enrollment Form, etc.</i>)</p>	N/A	
<b><i>Infant Meal Pattern and Infant Menu</i></b>	<p>Post in visible location or distribute</p> <p><i>N/A for AR, ADC</i></p>	GM 12	
<b><i>Vendor Agreement</i></b>	<p>Required when vending meals from outside source</p>	GM 4	

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## Meal Support Documentation

Form	Requirements	Location/Info	Reminders, document who is in charge, where forms kept, etc.
<i>Webcasts: Meal Pattern, Production Records</i>			
<b>Product Package Information</b>	Keep on file for cereal, whole grain rich, yogurt, and tofu food items	GM 12	
<b>Child Nutrition (CN) Labels/Product Formulation Statement (PFS)</b>	Keep on file for store bought combination foods (i.e. chicken nuggets, pizza, meatballs)	GM 12	

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## Civil Rights

Form	Requirements	Location/Info	Reminders, document who is in charge, where forms kept, etc.
<b>Webcast: Civil Rights Requirements</b>			
<b>And Justice for All Poster</b>	Post in visible location <ul style="list-style-type: none"> <li>Each site</li> <li>Admin office (if different than site)</li> </ul>	GM 8	
<b>Building for the Future Flier</b>	Post in visible location or distribute <ul style="list-style-type: none"> <li>Each site</li> </ul>	GM 8	
<b>WIC Information</b> <ul style="list-style-type: none"> <li>CACFP Fact Sheet or current WIC Brochure</li> </ul>	Post in visible location or distribute <ul style="list-style-type: none"> <li>Each site</li> </ul> <b>N/A for AR, ES, ADC</b>	GM 9	
<b>Racial and Ethnic Data Form</b>	Complete annually <ul style="list-style-type: none"> <li>Each site</li> </ul>	GM 8	
<b>Center Policies and Parent Handbook</b>	Include non-discrimination statement, if CACFP or USDA referenced	GM 8	
<b>Civil Rights Training</b> <ul style="list-style-type: none"> <li>Civil Rights Training Handout</li> <li>CACFP Training Attendance Sheet</li> </ul>	Complete annually with current staff and with new staff as hired  Document date, list of attendees, and keep copies of resources	GM 8	

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## Financial

Form	Requirements	Location/Info	Reminders, document who is in charge, where forms kept, etc.
<b>Record of Monthly CACFP Expenses</b>	System that tracks CACFP Expenses and Income (DPI General Ledger, report from accounting software, etc.)	GM 11	
<b>Receipts/Invoices</b>	Dated and itemized receipts/invoices for food, non-food/kitchen supplies  Separate co-mingled receipts  *Identify & exclude unallowable expenses	GM 11	
<b>Labor Time Sheets</b> • CACFP Labor Sheets	Documentation of hours and salary of staff performing CACFP work (food service, administrative)	GM 11	
<b>Food Donations/Farmers Market</b> • Food Donation Log • Local Food Purchase Log	Record food donations (e.g. list of foods donated, donation date, etc.)  Farmer's market purchases (e.g. date of purchase, list of food, cost, etc.)	GM 9, 11	
<b>Previous FFY Financial Report Support Documents</b>	General ledger; Profit and loss; and/or other financial records	GM 9, 11	
<b>Cost Allocations</b>	Other approved expenses paid in part or whole with CACFP funds	GM 9, 11	
<b>Bank Statements</b>	Prior month where CACFP funds are deposited	GM 9, 11	

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## Additional Sponsor Records (Agencies with more than one site participating on the CACFP)

Form	Requirements	Location/Info	Reminders, document who is in charge, where forms kept, etc.
<b>Webcasts:</b> Claim Edit Checks, Monitoring, Training Staff on CACFP Topics			
<b>Monitoring</b> <ul style="list-style-type: none"> <li>Pre-Operational Visit Form</li> <li>Site Monitor Form</li> <li>Site Review Tracking Form</li> </ul>	Complete and document pre-op and site visits	GM 5	
<b>Training</b> <ul style="list-style-type: none"> <li>Resources for Training CACFP Staff on Required Key Topics</li> <li>CACFP Training Agenda</li> </ul>	Train current staff and any new staff on required topics	GM 5	
<b>Edit Checks</b> <ul style="list-style-type: none"> <li>Meal Edit Checks sample form</li> </ul>	Perform and document two edit checks each month, for each site	GM 5	

**Contact your assigned consultant with questions!**